

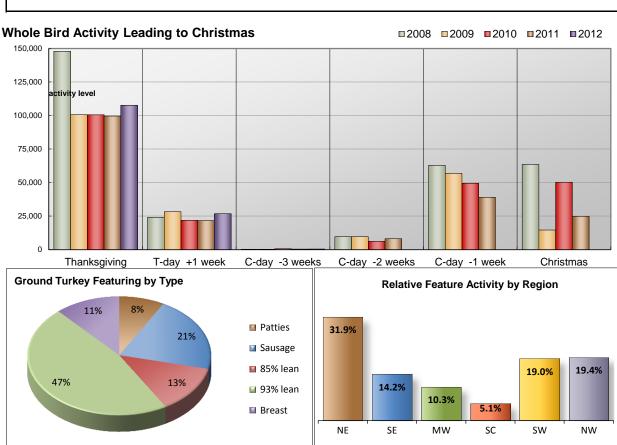
# **USDA Weekly Retail Turkey Feature Activity**

## Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/07 thru 12/13.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
	THIS	WEEK	LAST	WEEK	LAST YEAR						
Feature Rate 1/	39.0%	of 22,500	30.2% c	of 22,500	37.3% of 19,500 outlets						
	ou	tlets	out	lets							
Special Rate 4/		6%		2%	2.5%						
Activity Index 2/		,830		790	18,240						
3/ WHOLE BIRDS:	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
Fresh - Hens	20	1.49	10	1.99	70	1.73					
" - Toms	20		10	1.99	60	1.73					
Frozen - Hens	1,080		210		4,020						
" - Toms	1,120		210	1.09	3,950	0.87					
PARTS:	1,120	1.10	210	1.00	0,000	0.07					
Breast:											
Bone-in, whole											
Fresh	180	2.92	10	2.48	410	2.62					
Frozen	690	2.12	210	1.78	1,490	1.92					
Split, bone-in											
Fresh											
Rotisserie	100	7.24	180	7.07	1,940	8.92					
Boneless, whole											
Cutlets	330	5.40	560	5.37	120	4.42					
Cutlets, thin sliced	100	4.99									
Strips											
Tenders	50	4.52	250	5.02	290	4.19					
Marinated Tenders	570	3.93	220	4.17	130	4.56					
Drumsticks	30	1.60	150	1.73	90	2.05					
Thighs					70	2.38					
Wings	80	1.64	150	1.73	60	2.15					
Necks	10	1.25	60	1.62	30	1.99					
Smoked Drumsticks	200	1.98	130	1.99	180	2.48					
Smoked Wings	200	1.78	130	1.99	180	2.48					
Smoked Necks	190		10		170	1.99					
GROUND TURKEY:	10,410		6,840	3.39	4,660	3.45					
Patties	840		110		620	3.89					
Sausage	2,150		1,020		1,160						
85% lean	1,340		1,390		210	2.28					
93% lean	4,870		3,130		1,740	3.20					
Breast	1,210		1,190		930	4.38					
Rolls (frsh/frz 1 lb.)  Specialty 5/	90	2.00	290	1.85	120	2.60					
Patties	130	3.00			10	4.99					
93-94% lean	160		130	3.59	180	3.93					
Breast	70		30		100	4.99					
Note: rolls & specialty no											

# This Week's Turkey Feature Highlights Retailers begin to increase turkey feature activity heading into the Hanukkah and Christmas holidays. Offerings increase on fresh and frozen whole turkeys; price are lower on fresh, higher on frozen. Fresh and frozen bone-in breast are more actively promoted this week; advertised prices are higher. There still is not a lot of interest in promoting rotisserie breasts, certainly nothing approaching last year's level. The mix of offerings on boneless white parts in this week's circulars slows on cutlets, increases on marinated tenders; marinated tenders are priced to grab the shopper's attention. This is the week to pick up some smoked dark parts, they are actively promoted and prices are lower. Offerings on ground turkey increase; the weighted average price on ground turkey decreases. The 93% lean is the most actively promoted followed by sausage. More stores are featuring deli items. Advertised prices on service deli thick slicing meats trend lower on turkey, higher on chicken. Self-service deli offerings are very active on processor brands at unchanged to lower advertised prices.



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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	NORTI	HEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  27.6% of 4,000 sampled outlets  5.6% of stores w/ no-price promotions  Activity Index = 1,780			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,MS	S,NC,SC,TN,VA,	WV)				
Feature Rate 1/		0 sampled outlet	. ,		00 sampled out	,				
Special Rate 4/	0.0% of stores w	•		0.0% of stores v	•					
Activity Index <sup>2/</sup>		Index = 6,080			Index = 3,690					
Activity index	Price Range	Summar	V	Price Range	Summ	arv	Price Range	Summa	rv	
	(\$/pound)		Vtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens	1.99	10	1.99							
" - Toms	1.99	10	1.99							
Frozen - Hens	0.58 - 1.99	380	1.31	0.99 - 1.49	650	1.05	0.99	10	0.99	
" - Toms	0.99 - 1.99	420	1.40	0.99 - 1.49	650	1.05	0.99	10	0.99	
PARTS:										
Breast:										
Bone-in, whole										
Fresh	2.99	170	2.99				1.69	10	1.69	
Frozen	1.88 - 2.29	370	2.18	1.59 - 2.27	280	2.08	1.50 - 2.19	30	1.71	
Split, bone-in										
Fresh										
Rotisserie	6.89 - 7.49	100	7.24							
Boneless, whole										
Cutlets	4.99 - 5.99	280	5.50				3.98 - 5.45	10	4.77	
Cutlets, thin sliced	4.99	100	4.99							
Strips										
Tenders							3.98 - 4.79	10	4.42	
Marinated Tenders	3.73 - 4.26	550	3.91				4.66	20	4.66	
Drumsticks	1.59 - 1.99	20	1.77				1.25	10	1.25	
Thighs										
Wings	1.49 - 1.99	70	1.70				1.25	10	1.25	
Necks							1.25	10	1.25	
Smoked Drumsticks	1.99	190	1.99	1.69	10	1.69				
Smoked Wings	1.48 - 1.79	190	1.78	1.69	10	1.69				
Smoked Necks	1.79	190	1.79							
GROUND TURKEY:										
Patties	3.50 - 5.29	50	4.68				3.00 - 4.29	280	3.49	
Sausage	2.87 - 3.99	940	3.43	3.49 - 3.69	140	3.51	2.79 - 4.29	300	3.05	
85% lean	1.99 - 2.83	120	2.65	1.99 - 2.83	730	2.37	2.39 - 2.50	30	2.43	
93% lean	2.80 - 4.99	1,410	3.24	2.99 - 3.49	1,210	3.42	2.79 - 3.99	710	3.15	
Breast (99-100% lean)	3.59 - 4.79	190	4.67				3.59 - 4.79	250	4.52	
Rolls (frsh/frz 1 lb.)							1.50 - 2.50	50	1.92	
Specialty <sup>5/</sup>										
Patties	3.00	130	3.00							
93-94% lean	3.00 - 5.99	140	3.22				4.29	20	4.29	
Breast	5.49 - 6.99	50	6.24	5.49	10	5.49	5.49	10	5.49	





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH (	ENTRAL U.S.		SOL	ITHWEST U.S.		NORTHWEST U.S.			
	(AR,AZ,CO,KS,I	_A,MO,NM,OK,T>	(,UT)		(CA,HI,NV)		(AK,ID,MT,OR,WA,WY) 61.0% of 1,200 sampled outlets 10.7% of stores w/ no-price promotions Activity Index = 1,010			
Feature Rate 1/		00 sampled outle	,	45.3% of 2	2,900 sampled out	ets				
Special Rate 4/	0.0% of stores w	•			s w/ no-price prom					
Activity Index 2/		/ Index = 880			ity Index = 2,390					
Activity macx	Price Range	Summa	Price Range Summary			Price Range	Summa	arv		
	(\$/pound)		Vtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens	0.99	10	0.99							
" - Toms	0.99	10	0.99							
Frozen - Hens	1.19	40	1.19							
" - Toms	1.19	40	1.19							
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	1.78	10	1.78							
Split, bone-in										
Fresh										
Rotisserie										
Boneless, whole										
Cutlets	4.29	20	4.29	5.45	20	5.45				
	4.29	20	4.29	5.45	20	5.45				
Cutlets, thin sliced										
Strips										
Tenders	4.29	20	4.29	4.79	20	4.79				
Marinated Tenders										
Drumsticks										
Thighs										
Wings										
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY:										
Patties				3.49 - 3.99	310	3.52	3.50	200	3.50	
Sausage	2.99	20	2.99	2.87 - 3.27	550	3.09	2.87	200	2.87	
85% lean	2.50 - 2.79	110	2.56	2.39 - 3.75	350	3.34				
93% lean	2.49 - 2.91	550	3.09	2.79 - 3.99	580	3.05	2.80 - 3.19	410	3.00	
Breast (99-100% lean)	3.99	20	3.99	4.79	550	4.79	4.39 - 4.79	200	4.75	
Rolls (frsh/frz 1 lb.)	1.98	30	1.98	2.50	10	2.50	-			
Specialty 5/										
Patties										
93-94% lean										
Breast		1								



# **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Dec 07, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/07 thru 12/13.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Υ			NORTHEAST U.S.			SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)				
Feature Rate 1/	71.8% o	f 22,500	75.1% o	f 22,500	76.9% o	f 19,500							
Feature Rate	sto	res	sto	res	sto	res	91.2% of 4,400 sa	91.2% of 4,400 sampled outlets		57.3% of 6,000 sampled outlets			
Activity Index 2/	46	120	41,	190	20	830	Activity Inde	ex = 14,000		Activity Inc	lex = 9,540		
Activity index 2/	40,	120	41,	100	30,	030	Price Range	Summ	ary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	
SERVICE DELI - Turkey													
Category 1	<b>5</b> 000	7.00	4.500	0.44	7.000	7.04	5.00	0.000	0.04	0.00 40.40	4 700	7.05	
Processor Brand	5,600	7.88	4,580	8.14	7,890	7.91	5.98 - 9.99	2,360	8.21 7.67	6.99 - 10.49	1,700	7.65	
Private Brand	2,340	7.73	2,650	7.96	2,040	7.92	6.99 - 8.99	2,020	7.67				
Category 2  Processor Brand	4,730	5.83	5,440	6.14	3,850	5.80	4.98 - 7.99	1,350	5.81	4.99 - 6.99	790	6.03	
Private Brand	1,760	6.76	950	6.49	3,450	6.77	4.99 - 6.99	1,310	6.91	5.99	10	5.99	
Category 3	1,700	0.70	300	0.40	0,400	0.77	4.55 0.55	1,010	0.01	0.00	10	0.00	
Processor Brand	650	3.88	580	4.20	820	3.94	3.99 - 4.99	80	4.88	3.98 - 5.99	110	4.86	
Private Brand	1,410	5.77	120	4.99	80	3.98	3.99 - 5.99	140	5.36	3.99 - 5.99	70	5.27	
Turkey Ham	,												
Processor Brand	430	3.53	220	3.55	280	2.78	2.99 - 4.99	300	3.69	4.99	20	4.99	
Private Brand			20	3.99									
Turkey Pastrami													
Processor Brand	430	4.13	170	4.14	180	4.77	4.99	110	4.99	4.99	20	4.99	
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,120	7.47	3,850	7.07	3,020	7.22	5.99 - 8.99	1,720	7.86	6.99 - 8.99	130	7.55	
Private Brand	1,840	7.33	1,560	7.15	640	6.99	5.99 - 7.99	1,580	7.39	7.99	10	7.99	
Category 2													
Processor Brand	460	5.54	280	5.01	10	4.40	4.99 - 5.99	60	5.81				
Private Brand	50	5.98											
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz Processor Brand	10.520	3.10	7,570	3.10	6,770	3.08	2.49 - 4.00	1,700	3.35	2.50 - 3.59	2,770	3.08	
Private Brand	900	2.70	,	2.66	1,850	3.14	2.49 - 4.00	30	3.33 2.79	2.50 - 3.59	480	2.60	
Turkey 16 oz	900	2.70	2,030	2.00	1,000	3.14	2.46 - 2.99	30	2.79	2.30 - 3.30	400	2.00	
Processor Brand	1,120	4.67	460	5.01	1.110	5.48	4.49 - 4.99	100	4.55	4.99	190	4.99	
Private Brand	.,.25	1.07	100	0.01	.,5	5.15		100		1.00	100		
Chicken 7-10 oz													
Processor Brand	9,860	3.08	7,430	3.11	5,430	3.02	2.49 - 4.00	1,110	3.27	2.50 - 3.59	2,760	3.08	
Private Brand	900	2.70	2,650	2.69	1,410	3.11	2.48 - 2.99	30	2.79	2.50 - 3.50	480	2.60	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHV	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,I	HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	92.49/ at 4.00/	0 sampled outlets	CO 50/ of 4 00/	) sampled outlets	E9 49/ at 2 000	sampled outlets				
		ndex = 9,490	·	ndex = 6,200	·	dex = 4,640	79.1% of 1,200 sampled outlets			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Activity Index = 2,250  Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(4, 5 5 5 5 7	- Closed Tribuning	(4, 5 0 0.10)		(4, 5 0 0.10)		(4, p = 3)	- Clare Trianing		
Category 1										
Processor Brand	5.99 - 8.99	830 7.56	6.99 - 9.49	100 8.63	6.99 - 8.99	270 7.13	6.99 - 12.99	340 7.84		
Private Brand	6.99 - 9.99	270 8.12	7.99	50 7.99						
Category 2										
Processor Brand	4.98 - 6.99	1,780 5.72	4.99 - 6.99	600 5.89	5.99	170 5.99	5.98	40 5.98		
Private Brand	5.98 - 6.99	120 6.16	5.98 - 6.98	310 6.46			4.99	10 4.99		
Category 3										
Processor Brand	2.99 - 4.49	390 3.44	2.99 - 4.99	30 4.14	3.29 - 3.99	40 3.38				
Private Brand	3.99 - 5.99	110 5.48	4.99 - 5.99	230 5.48	5.99	550 5.99	5.99	310 5.99		
Turkey Ham	0.00 0.50	40 000	0.00	40 000	0.40	00 0.70				
Processor Brand	2.99 - 3.58	10 3.33	2.99	10 2.99	2.49 - 2.99	90 2.73				
Private Brand										
Turkey Pastrami	0.40	040 0.50	0.07 4.00	00 400						
Processor Brand	3.49 - 3.98	210 3.53	3.97 - 4.99	90 4.29						
Private Brand										
SERVICE DELI - Chicken										
Category 1	5.05	500 004	500 700	040 007	0.00 7.40	200 700	0.00 40.00	242 742		
Processor Brand	5.95 - 9.99	590 6.91	5.99 - 7.99	210 6.67	6.99 - 7.49	260 7.02	6.99 - 10.99	210 7.16		
Private Brand	5.98 - 7.99	170 6.46	7.99	80 7.99						
Category 2  Processor Brand	4.69 - 5.99	210 5.96	4.99	190 4.99						
Private Brand	5.98	20 5.98	5.98	30 5.98						
SELF-SERVICE DELI	5.96	20 5.96	5.98	30 5.96						
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	1.98 - 3.99	2,200 2.87	1.69 - 2.39	1,650 2.97	1.99 - 3.69	1,540 3.23	1.88 - 3.50	660 3.33		
Private Brand	2.50 - 2.99	170 2.73	2.50 - 2.99	220 2.88		1,010		0.00		
Turkey 16 oz										
Processor Brand	4.49 - 5.98	50 4.73	4.47 - 4.98	550 4.50	4.49 - 4.99	210 4.89	4.49	20 4.49		
Private Brand										
Chicken 7-10 oz										
Processor Brand	1.98 - 3.99	2,190 2.87	1.69 - 2.39	1,630 2.97	2.99 - 3.69	1,510 3.26	1.88 - 3.50	660 3.33		
Private Brand	2.50 - 2.99	170 2.73	2.50 - 2.99	220 2.88						

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)